

Course Description – Curriculum 2018

Subject: FN282 Wealth Management

Credits: 3

Prerequisite: -

(No credits earned from this course if FN281 Personal Finance is also taken)

Description: Evaluations of potential customers, personal tax planning, life-cycle investing, measurement of risk of and return on financial assets, portfolio theory, portfolio optimization, investment policy statements, investments in real estate investment trusts, performance evaluation of mutual funds, retirement planning, wealth transfers, heritage, donations, new issues in wealth management.